

## **SECTION M EVALUATION FACTORS FOR AWARD**

### **Clauses Incorporated by Reference.**

FAR 52.217-5, Evaluation of Options (JUL 1990)

### **M.1 EVALUATION PROCESS**

a. The Government intends to award multiple contracts resulting from this solicitation to the responsible offerors whose offers, conforming to the solicitation, will be the most advantageous to the Government, price and other factors considered. The Government anticipates awarding three contracts under the Thought Leadership/Change Management LoB. However, the Government reserves the right to award more, less, or no contracts for this LoB. The Thought Leadership/Change Management LoB is being awarded under full and open competition.

b. Options. The Government will evaluate offers for award purposes by adding the total price for all options to the total price for the basic requirement. Evaluation of options shall not obligate the Government to exercise the option(s).

c. A written notice of award or acceptance of an offer, mailed or otherwise furnished to the successful offeror within the time for acceptance specified in the offer, shall result in a binding contract without further action by either party. Before the offer's specified expiration time, the Government may accept an offer, whether or not there are negotiations after its receipt, unless a written notice of withdrawal is received before award.

### **M.2 BASIS FOR AWARD**

Any award to be made will be based upon best value and made to offerors whose offers, conforming to the solicitation, will be the most advantageous to the Government, price and other factors considered. Offerors are cautioned that an award may not necessarily be made to the lowest price offeror. However, if non-price factors are evaluated as comparatively equal between two or more offerors, price may become a determinative factor.

#### **a. Relative Order of Importance Terminology.**

Evaluation criteria consist of factors. In order to provide the offeror with an understanding of the significance assigned by the Government, the factors are assigned a relative order of importance. The following terminology is used:

Significantly More Important. The criterion is substantially more important than another criterion. The criterion is given far more consideration than another criterion.

More Important. The criterion is greater in value than another criterion, but not as much as a significantly more important criterion. The criterion is given more consideration than another criterion.

Approximately Equal. The criterion is nearly the same in value as another criterion; any difference is very slight.

**b. Factors to be Evaluated.**

Management Factor  
Corporate Capabilities Factor  
Past Performance Factor  
Small Business Participation Factor  
Price Factor

There are no subfactors to be evaluated.

**c. Relative Order of Importance of Factors.**

**Factor Order of Importance:** The Management Factor is More Important than the Corporate Capabilities Factor. The Corporate Capabilities Factor is More Important than the Past Performance Factor and the Small Business Participation Factor. The Past Performance Factor and the Small Business Participation Factor are Approximately Equal. The Past Performance Factor and the Small Business Participation Factor are each More Important than the Price Factor.

All non-Price evaluation factors, when combined, are Significantly More Important than the Price Factor.

**M.3. EVALUATION APPROACH**

Factors to be evaluated are:

**FACTOR 1 – MANAGEMENT**

Proposals will be evaluated to assess the offerors' understanding of the technical and management requirements. In conducting this assessment, the following will be considered as applicable: understanding of the BTA mission, feasibility of approach, and completeness of the proposal. The assessment of proposals under this factor will include an assessment of the Offerors' Performance Work Statement (PWS).

a. Understanding of the Business Transformation mission. The extent to which the proposal demonstrates a clear understanding of the mission, objectives and goals of the Business Transformation Agency (BTA).

b. Feasibility of Approach. The extent to which the proposed approach is workable and the end results achievable. The extent to which successful performance is contingent upon proven services and techniques compliment the BTA objectives. The proposal will be evaluated to determine whether the Offeror's methods and approach in meeting the objectives adheres to sound practices, and reflects significant relevance to the BTA objectives, environment, and constraints while providing the Government with a high level of confidence to ensure successful performance.

c. Completeness. The extent to which the proposal adequately and completely considers, defines, and satisfies the requirements specified in the solicitation. The extent to which each requirement of the solicitation has been addressed in the proposal in accordance with the proposal instructions in the solicitation.

The Government's evaluation will consider the following:

- The Government will evaluate the Offeror's methodology for recruitment, training, and retention of qualified personnel to support the BTA mission throughout the performance period.
- The management proposal will be evaluated on how it demonstrates the implementation of the proposed solutions with reference to the timely delivery of reliable, secure, flexible, responsive, and compliant services.
- The Government will evaluate the Offeror's overall program management approach to assess its understanding of the scope and support required for the BTA mission.
- The Government will evaluate the Offeror's approach to manage and coordinate its subcontractor efforts.
- The Government will evaluate the Offeror's processes for internal team communication, monitoring team performance, and resolving team conflict.
- The Government will evaluate the Offeror's organizational approach to the extent that it demonstrates clear lines of communication with delegated authority, which allows for timely accomplishment of tasks, timely submission of deliverables, immediate resolution of task discrepancies and establishes corrective action plans.

## **FACTOR 2 – CORPORATE CAPABILITIES**

Proposals will be evaluated to assess the offerors' corporate capabilities. The assessment of proposals under this factor will include an assessment of the Offerors' Performance Work Statement (PWS).

The Government's evaluation will consider the following:

- The Government will evaluate the Offeror's Corporate Capabilities in Performance-Based Acquisitions, Program Management, Business Processes, Task Management, and Customer Relationship Management on similar efforts of the same or similar scope and magnitude.
- The Government will evaluate the Offeror's knowledge of and experience with commercial and DoD policies and processes as it relates to the LoB.
- The Government will evaluate the Offeror's ability to resource and manage simultaneous Task Orders.
- The Government will evaluate the Offeror's business processes and quality certifications to be used in performing taskings under the LoB.

## **Factor 3: PAST PERFORMANCE**

The Government will conduct a performance risk assessment based on the quality, relevancy and currency of the offeror's past performance, as well as that of its major subcontractors, as it relates to the probability of successful accomplishment of the required effort. The source of information regarding past performance, the context of the data and general trends in performance may also be considered.

When assessing past performance, the Government will focus its inquiry on the past performance of the offeror and its proposed major subcontractors as it relates to all solicitation requirements. These requirements include all aspects of cost, schedule and performance, including the offeror's record of: 1) conforming to specifications and standards of good workmanship; 2) adherence to contract schedules, including the administrative aspects of performance; 3) commitment to customer satisfaction; 4) business-like concern for the interest of its customers; 5) meeting small and small disadvantaged and women-owned small business subcontracting goals; 6) establishing and maintaining adequate management of subcontractors; and, 7) ability to resolve problems quickly and effectively.

A significant achievement, problem, or lack of relevant data in any element of the work can become an important consideration in the source selection process. A negative finding under any element may result in an overall high risk rating. Therefore, offerors

are reminded to include all relevant past efforts, including demonstrated corrective actions, in their proposal. Offerors are cautioned that in conducting the past performance assessment, the Government may use data provided in the offeror's proposal and data obtained from other sources. Since the Government may not necessarily contact all of the sources provided for the offerors, it is incumbent upon the offeror to explain the relevance of the data provided. Offerors are reminded that while the Government may elect to consider data obtained from other sources, the burden of proving good past performance rests with the offerors. In addition to the past performance of the offeror and its major subcontractors, the Government may consider the past performance of predecessor companies and key personnel with relevant past performance. If there is no relevant past performance, the offeror will be evaluated neither favorably nor unfavorably and such lack of relevant past performance will be considered an unknown risk.

#### **Factor 4 – SMALL BUSINESS PARTICIPATION**

All offerors (both large and small businesses) will be evaluated on the level of small business commitment that they are demonstrating for the proposed acquisition, and their prior level of commitment to utilizing small businesses in performance of prior contracts. The following shall evidence small business participation:

- a. The extent to which such firms, as defined in FAR Part 19, are specifically identified in proposals;
- b. The extent of commitment to use such firms (enforceable commitments will be weighed more heavily than non-enforceable ones);
- c. The complexity and variety of the work small firms are to perform;
- d. The realism of the proposal;
- e. Past performance of the offeror in complying with requirements of the clauses at FAR 52.219-8, Utilization of Small Business Concerns, and, for all large business offerors, FAR 52.219-9, Small Business Subcontracting Plan;
- f. The extent of participation of such firms in terms of the value of the total acquisition;
- g. The extent to which the offeror provides detailed explanations or documentation supporting the proposed participation percentages, or lack thereof. The Department of Defense (DOD) has established small business goals as an assistance to assure small business receives a fair proportion of DOD awards. The goals for this procurement are as follows:

The Government's minimum mandatory requirement for overall Small Business participation and the non-mandatory objectives for participation that are related to the identified small business subcategories are set forth in the following table:

Category	Requirement/Objectives
Small Business (inclusive of all categories below) (minimum requirement)	23% (includes % below)
Small Disadvantaged Business (objective)	6%
Woman-Owned Small Business (objective)	5%
Service-Disabled Veteran-Owned Small Business (objective)	3%
Veteran Owned Small Business (objective)	3%
Hub-Zone Small Business (objective)	1%
HBCU/MI (objective)	Positive Goal

**Each requirement / objective reflects a percentage of the total contract value.**

**To be eligible for award of a contract resulting from this solicitation, offerors must meet the minimum overall Small Business participation requirement of 23%.**

### **Factor 5 – PRICE**

a. The price factor consists of the Total Contract Life Price (TCLP). The TCLP is calculated by multiplying the evaluation quantity times the unit price for each priced CLIN/SLIN in the CLIN List, and by adding all extended prices for the base year and all option years.

b. The price evaluation period will begin with the anticipated date of contract award, which is thought to be **{insert date}**. The evaluated contract life for this requirement is 60 months.

c. The clause FAR 52.219-4 (Notice of Price Evaluation Preference for HUBZone Small Business Concerns) is applicable to the services portion of this acquisition. In accordance with paragraph (b)(1) of the clause, subject to specified conditions, a 10% price adjustment will be applied to the total evaluated price of the service CLINs/SLINs of those competing offerors that do not qualify for the price evaluation preference. There is a provision for certification, applicable to all offerors, in **Part \_\_\_\_** of the RFP. The evaluation preference clause, FAR 52.219-4, is referenced in **Part \_\_\_\_** of the RFP. **Part \_\_\_\_** includes a blank for a HUBZone Small Business (HSB) concern offeror that desires to indicate waiver of the preference.

In order for the price adjustment to be applied, certain criteria must be met. There must be an offer from a HSB concern that has not waived the adjustment. Also, under (d)(1) of the clause, an offeror must propose that at least 50% of the cost of personnel for contract performance will be spent for its employees or employees of other HSB concerns.

If there is a HSB concern offeror that meets the eligibility criteria and has not waived the adjustment, it will not be subject to the price adjustment. For offerors that have waived

the adjustment, the price adjustment will be applied in accordance with paragraph (c) of the clause to the total evaluated price of their service CLINs/SLINs.